


BEACON  
North Carolina  
Office of the State Controller

# BEACON SAP Workflow

## WF220




Slide 1


Welcome to *WF220 BEACON SAP Workflow* training. This course is designed for individuals working at State agencies who support the Workflow approval process.

### Notes

## SAP Training — Welcome and Introductions



- Welcome to SAP Workflow for Agencies course.
  - Introductions
  - Sign-in sheet
  - Tent cards
  - Restrooms
  - Breaks
  - Parking lot
  - Classroom etiquette
    - Cell phones off
    - No side conversations



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### Notes

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

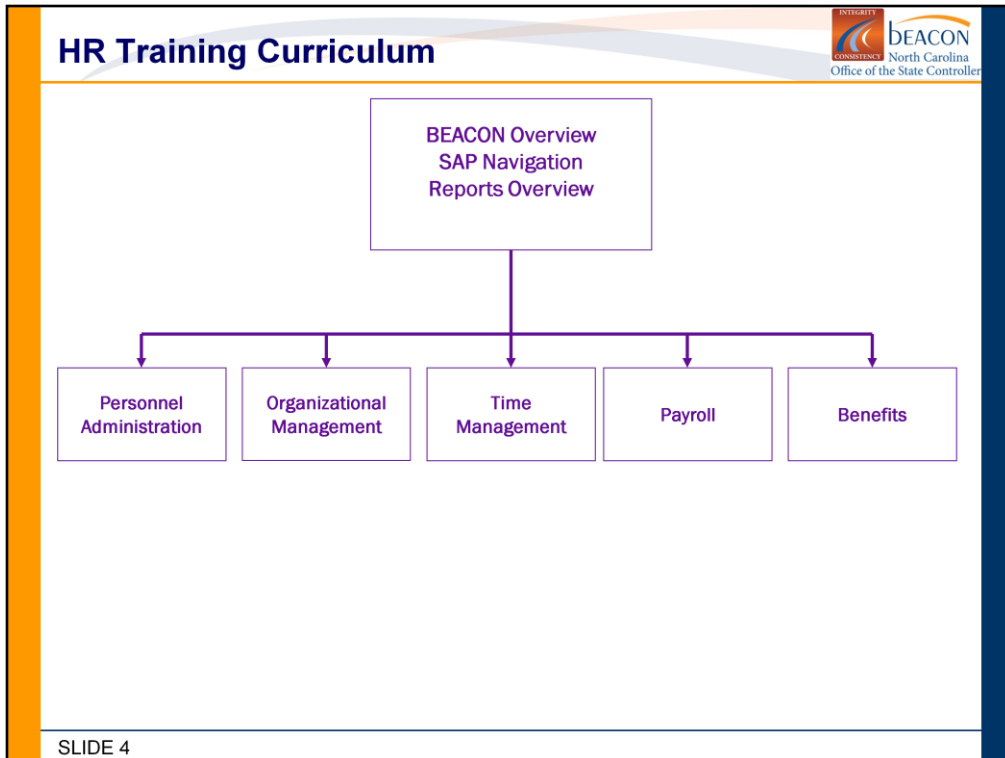
### Prerequisites

- Prerequisites for all:
  - BEACON Overview, BC100
  - SAP Basic Navigation, BC110
- If you are an Initiator, you need to take the following courses in your area (OM or PA):
  - Organizational Management Overview, OM200
  - Organizational Management for Agencies, OM210
  - Personnel Administration Overview, PA200
  - Personnel Administration Terms Concepts and Display Data, PA210
  - Create and Maintain Employee Data, PA 310
- If you are a budget Approver, you need to take:
  - Agency Funding Approval OM250

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### Notes

The prerequisites are listed above. Attending these prerequisites ensures that you are adequately prepared to learn the new processes, concepts, and data entry skills that are covered in this course.




The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the module/s.

**Notes**



# Course Map



- Lesson 1: Workflow Overview**
- Lesson 2: Access and Navigate the Workflow Inbox and Outbox**
- Lesson 3: Approve OM Workflow PCRs**
- Lesson 4: Approve PA Workflow PCRs**
- Lesson 5: Workflow Report**
- Lesson 6: Course Review**

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## Notes


## Course Objective



- Upon completion of this course, you should be able to:
  - Explain the Workflow process for Organizational Management (OM) and Personnel Administration (PA)
  - Identify key differences in the routing of Workflow (WF) Items in OM and PA
  - Access, navigate and complete items within the Workflow Inbox
  - Use Key features to manage OM/PA Workflow Items
  - Execute reports

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## Notes



## Strategy for Training


- Tell me** **Concepts**  
Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN
- Show me** **Demonstrations**  
Instructor will demonstrate job-related tasks performed in SAP – HANDS OFF
- Let me** **Exercises**  
Student will complete the exercises which allows for hands-on practice in class – HANDS ON
- Support me** **Availability**  
Instructor will be available to answer questions while the students complete the exercises.

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The *BEACON SAP Workflow* student guide provides a copy of the PowerPoint presentation used in the classroom training. Observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the SAP training environment.

### Notes

**Reference Materials**



- Student Guide
- Other resources
  - Online help
  - Simulations
  - Work instructions
  - Job Aids



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### References (Job Aids)

In addition to the Student Guide these quick references are available:

- How to Access the Inbox
- How to Check the Status of a Request
- OM SAP Routing Table
- PA SAP Routing Table

These references are also available online through the BEACON University web site.

The data presented in this course is representative of your work environment. However, the Action scenarios and exercises included in the course have been created solely for the purpose of training.

### Other resources

BEACON Online help:


- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

### Notes

### Online help

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures
- Includes links to simulations

To access BEACON Help, select the **Help > BEACON Help** menu option from any SAP ERP screen.



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### Notes

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# Course Map

Lesson 1: Workflow Overview

Lesson 2: Access and Navigate the Workflow Inbox and Outbox

Lesson 3: Approve OM Workflow PCRs

Lesson 4: Approve PA Workflow PCRs

Lesson 5: Workflow Report

Lesson 6: Course Review

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**Notes**

## Lesson 1 Objectives




- Upon completion of this lesson, you should be able to:
  - Explain the purpose of Workflow
  - Define key Workflow terms
  - Identify key changes in the approval process
  - Describe the differences between the OM and PA Workflow process
  - Identify how to trouble shoot PCRs

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## Notes

### Purpose of Workflow

- To provide an electronic approval process for PA and OM Actions at various levels:
  - Division/Agency
  - Funding
  - OSP
  - OSBM
- To give users the ability to create, track and approve Workflow items



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In some ways, BEACON Workflow is used to replicate the electronic forms for processing former PMIS PD105s (Personnel Actions) and PD118s (Position Actions).

### Notes



## Key Terms (1 of 3)



- Action – a new or change to a position or personnel record
- Documents - SAP messages that provide an audit trail for every Workflow item that has been created
- Priority - a setting that indicates the urgency of the Workflow item based on the business requirement
  - The Workflow default is 5 (Medium)
- Initiator – the person who enters the Action for PA or OM and starts the Workflow process
- Routing Table – a list of Actions/reasons and the logic to support the approval process

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## Notes

**Action:** This term is used in both PA and OM to indicate a new or change to an existing position or employee.

**Documents:** A documents option is contained in both the Inbox and Outbox. Documents are BEACON's way of tracking all transactions that take place within the system. You will not use documents very often.

**Priority:** The Initiator of a Workflow item cannot change the default setting, which is medium. Only Approvers can change the setting.

**Initiator:** The OM or PA user who enters the data for either an OM or PA Action. In PA, the Initiator will ultimately enter the data for the Action into the employee's BEACON SAP personnel record.

**Routing Tables:** Both OM and PA have a custom table created for the State of North Carolina within SAP to hold the list of actions/reasons and logic to support the approval process for positions and personnel. The table identifies which Action goes to which approval level.

## Key Terms (2 of 3)



- Workflow Tracker – link that shows where the Workflow item has already been and where it will go for approval
- Workflow Header - link that displays the data used in the Workflow item—either the PA or OM request form
- Workflow Log – more detailed information about the approval levels and the Approver names at each of those levels
- PCR – Personnel (or Position) Change Request

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## Notes

**Workflow Tracker:** a link that will show you the name of the Step, Status, Result, Time & Agent for each Workflow item. The Workflow Tracker shows who initiated, who approved, and who the next approvers are in the process.

**Workflow Header:** the top portion of the Workflow Tracker link that displays the data that was entered by the Initiator for the Workflow item. The Workflow Header answers this question, “What data was used to execute this Workflow item?”.

**Workflow Log:** a more detailed view of the individual steps the document goes through within the Workflow process (detailed Workflow Tracker). The Workflow Log answers the question, “Who has the Workflow item in his/her inbox?”.

**PCR:** A Personnel or Position Change Request (PCR) is a number assigned to each Workflow item. The PCR can be used to identify and track a Workflow item.

Currently BEACON is only using Personnel Change Request forms within the Workflow environment. In the future BEACON may implement additional approval Workflow processes (not to include, but as an example, Vendor Invoice approvals, Purchase Order approvals, etc.). These additional Workflow processes would use a term other than PCR.

### Key Terms (3 of 3)



- Approver – the person(s) assigned to positions designated to approve or reject Workflow items
- Substitutions – a person who can temporarily act for an Initiator or Approver who is absent

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### Notes

**Approver:** Several positions are assigned with approval status at various levels within the organization. The security access assigned to the position determines if the position holder has approval authority for PA, OM or both. The authority to approve belongs to the position, not the person holding the position. When the person leaves the position, he or she may no longer have approval authority.


Generally, there are at least two Approvers assigned to each level so that when the Initiator executes Workflow, the PCR is sent to the Inbox of all of the Approvers at that level. This allows the approval process to continue if one of the Approvers is out of the office for a period of time.

**Substitutions:** Agencies can have a substitute assigned when an individual is out. The Agency must submit a request to BEST Shared Services (BEST). The user that is substituting must have the same security role(s) as the one for whom the user is being substituted. The Substitute will see all of the items in the Inbox of the individual for which he or she is substituting.

## Key BEACON Workflow Process



OM WF Process	PA WF Process
<ul style="list-style-type: none"> <li>One Action to fund and create new positions</li> <li>Agency Funding Approval is first level</li> <li>OSBM is an automatic step in the process when applicable</li> <li>Notes and documents can be included by using the Services for Objects option</li> <li>Initiator starts Action in Planned status, <b>BEST</b> completes the final step for Active status</li> <li>PCR #s begin with 5 (5000000000)</li> <li>PCR does not return to Initiator</li> </ul>	<ul style="list-style-type: none"> <li>Funding approval is last step (same as previously)</li> <li>Notes and documents can be included (Services for Object option)</li> <li>Initiator starts Action, <b>Initiator</b> completes the final step after approvals</li> <li>PCR #s begin with 1 (1000000000)</li> <li>PCR returns to Initiator to explicitly complete WF</li> </ul>



←

The Services for Objects option allows notes and documents to be sent with WF

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### OM BEACON Process

*Funding* a position and *establishing* are now combined into one Action. During WF, the positions are in Planned Status.

OSBM approval is a step in the BEACON new position Action Workflow process; therefore, it is no longer necessary to have OSBM approve the funding of a position in a separate form prior to creating the new position (establish position action). OSBM Funding Approval is not required if creating new positions as *temporary*.

When the Initiator executes OM Workflow, the first approval level in BEACON is the Agency Funding Approval (Budget Approval). In the previous system, this was the last approval in the process.

The Services for Objects option allows notes and attachments (Word, Excel, Notepad) to be included with the WF PCR. All Approvers at the next levels (unless marked private) can view the notes or attachments. Only the creator of the private note can view it.

After all approvals are final, the OM Workflow item is sent to BEST. While BEST is not an Approver, there are certain functions they must perform to move the position from Planned status to Active.

### PA BEACON Process

The Initiator (not BEST) completes the PA Action.

The Agency Funding Approver is last (as was true previously).

Services for Objects is also available in PA which allows notes and documents to be included with the PCR.

### Notes

## Workflow Approver Relationships

- DA1 – Division Approver
- AA1 – Agency Approver
- FA1 – Funding Approver
- OA1 – OSP Approver
- BA1 – OSBM Approver

Other:

- SOM – Shared Services OM Processor (not approval level, but final step in OM)




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The above list shows the different levels that an OM or PA Action may be sent for approval. The OM/PA Routing Tables were set up to determine how the PCR is routed.

### Notes

## PCR Trouble Shooting



Reasons why a PCR appears to be “lost”

- It was saved but not initiated.
- The Initiator or Approver has the incorrect security role to process the PCR.
- Incorrect relationships have been set up.
- An individual has “multiple hats” for approval and is the Initiator of some Actions too.
- The PA PCR workflow has been completed, but the PA infotypes have not been entered and explicitly completed.

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### Notes

If the Initiator merely saved the PCR and did not click the Initiate Workflow button, the PCR stays in the Inbox of the Initiator. Therefore an Approver who is waiting to see the PCR in the Approver Inbox will not be able to do so. If neither the Initiator nor the Approver can see the PCR, contact BEST.

The Initiator or Approver has incorrect security roles to process a PCR.

If the workflow tracker indicates “no user ID”, or “vacant” then an incorrect relationship may have been set up or the Approver position is unoccupied. BEST can access the table routing to determine if there is an error in the relationship.


If a user is an Initiator as well as an Approver, it can sometimes be confusing. That is because the same PCR will leave the Inbox of the Initiator role and be sent to the Inbox of the Approver role (which to the employee is the same Inbox).

In PA, the Initiator has to click a “Completed Workflow Item” button when the personnel file changes have been completed. In some cases, the Initiator may have inadvertently clicked the button prematurely.

If a user accidentally backs out of an Action without processing all infotypes, BEACON may assume the Action is complete when it is not.

## Lesson Review

- In this lesson you learned to:
  - Explain the purpose of Workflow
  - Define key Workflow terms
  - Identify key changes with SAP Workflow
  - Describe the key differences in the OM and PA Workflow process
  - Identify how to trouble shoot PCRs



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**Notes**

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Lesson 5: Workflow Report

Lesson 6: Course Review

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**Notes**

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## Lesson 2 Objectives




After completing this lesson, you should be able to:

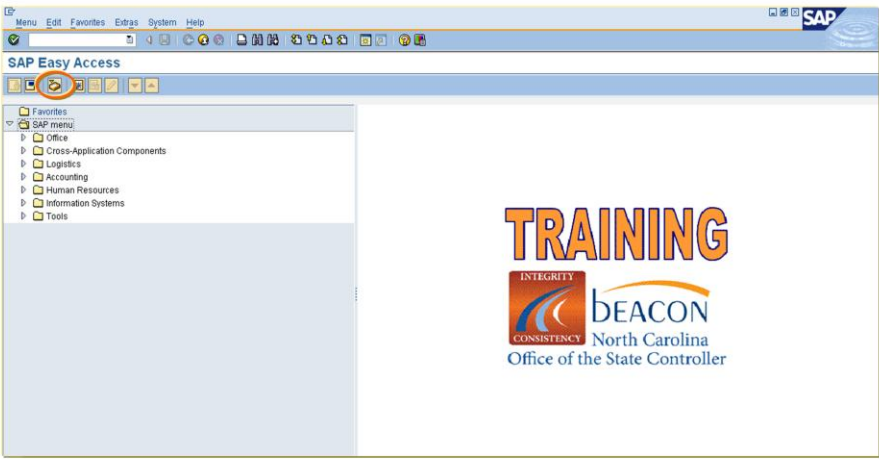
- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Identify the priority levels that can be set for a PCR
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header


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## Notes

## Accessing the Workflow Inbox (SBWP)





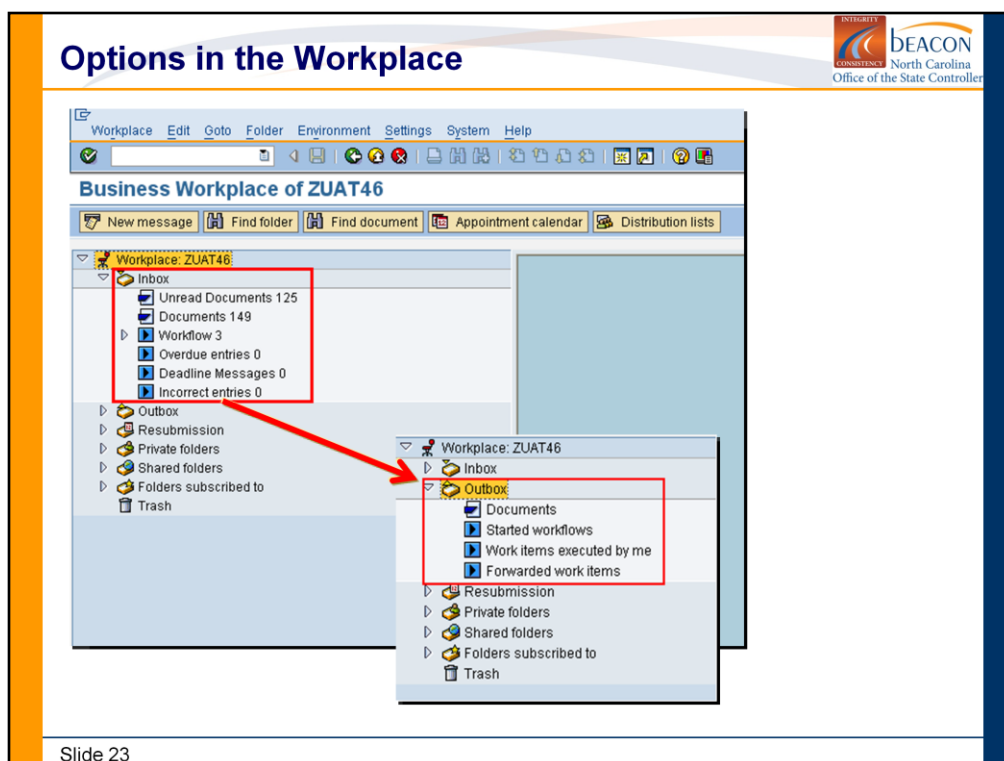
Click the **SAP Business Workplace**  button

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### Notes

An Approver accesses the Workflow PCRs that have been sent for him or her to take Action on via the Workflow option in the Inbox.

The Inbox is accessed either from the Easy Access screen using the Business Workplace button, or by entering SBWP in the Command field.



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## Notes

The Workplace is organized by folders. You will mainly use the Inbox and Outbox folders.

**Documents:** Both the Inbox and Outbox have Documents. As noted previously, BEACON SAP creates a document for every entry made, like an audit trail. Documents are also generated as notifications to approvers when a PCR is rejected. The two options for documents are Unread Documents (documents that have not already been read) and Documents (documents that are new and ready to read). In BEACON, documents are informational only.

### Inbox

**Workflow:** This option will hold all the BEACON WF PCRs that have been sent to you and all Approvers at your approval level for processing.

The following Inbox options are not being used: Overdue entries, Deadline Messages, and Incorrect entries.


### Outbox






**Started Workflows:** Workflow Items for which you were the Initiator.

**Work items executed by me:** Work Items that you have processed by either approving, cancelling, or returning to the Initiator.

The *Forwarded work items* Outbox option is not being used.

## Workflow Status



- Possible statuses for a work item are:
  - *Ready* 
  - *Reserved* 
  - *In process* 
  - *Executed* 
  - *Completed* 

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A graphical icon shows the status of a PCR at a glance. There are five possible statuses for a PCR:

**Ready:** The PCR is released to the Inbox of the next approval level and is ready for an Approver to take action.

**Reserved:** The PCR has been reserved by an Approver which removes the PCR from the Inbox of all other Approvers at that level. The PCR is only displayed in the Workflow inbox of Approver who reserved it.

**In Process:** A PCR assumes this status if:

- It is being executed by an Approver.
- It is waiting for its terminating event.
- The execution is terminated by an Approver.
- The execution has been terminated with a temporary exception for which no subsequent steps have been modeled.


In Process status means the Workflow system has not yet recognized the point at which processing is completed. For example, all approvals have not occurred or approvals have occurred but the final processing of the PA or OM action has not occurred.

**Executed:** The PCR is awaiting a specific confirmation of its completion which is required. A PCR with *executed* status can be executed several times until it is set to the *Completed* status in the Business Workplace.

**Completed:** The execution of the PCR is completed and is no longer displayed in the Workflow inbox of the Business Workplace. This means that the PA or OM Action is complete and records are active in BEACON.

## Notes

## Workflow Status - In Process



**Workflow 3**

Ex	Title	Status	Creation Da	Creation	Priority
4201	OM Action Create New Position for Position - 61000222 PCR: 5000000043	In Process	10/25/2007	08:59:42	5
4201	OM Action Reallocate Position Up for Position 61000475 PCR:	In Process	11/19/2007	14:55:42	5
4201	OM Action Position Transfer for Position 61000192 PCR:	In Process	11/06/2007	17:12:57	5

Workflow status (1) 6 Entries found

WF Stat	Short Descri
N	In Process
R	Rejected
C	Canceled
A	Approved
D	Created
M	Completed

**4201 - OM Action Create New Position for Position - 61000222 PCR: 5000000043**

Description

Workflow status: In Process

Objects and attachments


- Office Document: This is my note

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### Notes

- After an Initiator initiates Workflow, the status is updated to “**N**” for in process.
- After an Approver approves the PCR, the status is set to “**A**” for approved and will remain at “**A**” for all approval levels unless an Approver returns (rejects), reserves, or cancels the PCR.
- When an Approver returns (rejects) a PCR, the status is changed to “**R**” for rejected. The PCR is automatically sent back to the Inbox of the Initiator.
- If the initiator accepts the rejection of an action, the Workflow status will change to “**C**” for canceled.
- For OM Actions, after BEST Shared Services processes the approved PCR, the status is changed to “**M**” for completed.
- For OM if an Action is rejected, BEST Shared Services processes the canceled action. This changes the OM Action in planned status to rejected status and the WF status is changed to “**M**” for completed.

## Routing to OSP



Decision Edit Goto System Help

 Workflow
  Create

**1701 - OM Action Position Working Title Change for Position - 61001643 PCR: 5000002477**

Choose one of the following alternatives

Approve change

Return to initiator

Send to OSP

Cancel and keep work item in inbox

**Description**

Workflow status: **Approved**

Please review the information in this screen and make your choice as follows:

**Approve change** - the request will continue onto the next approver or processor.

**Objects and attachments**

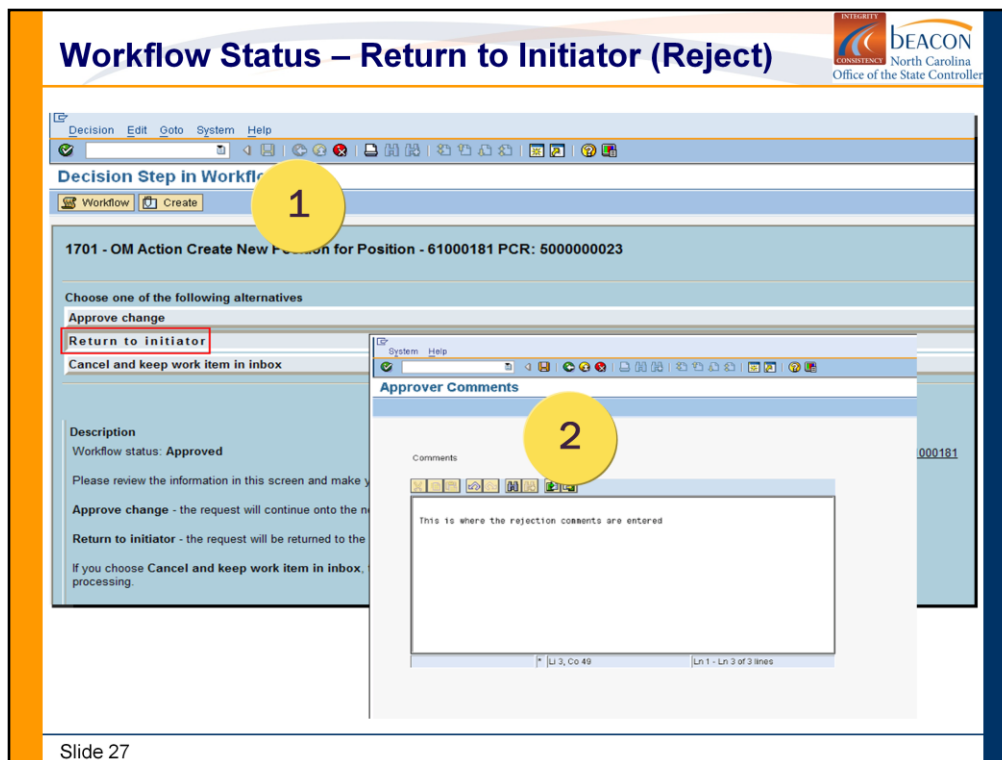
- OM\_Header: PCR -5000002477
- OM\_Control: Workflow Tracker

This tab is only available for viewing on the “Agency Approver’s” screen.

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### Notes

**IMPORTANT NOTE:** Routing to OSP is not an automatic part of the process. If a PCR needs to be sent to OSP, the Approver must click the *Send to OSP* option. The Send to OSP option is only available at the Agency approval level.



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## Notes

If an Approver clicks the *Return to initiator* option, a comments window automatically displays (this is not the same as the Services for Objects button). The Approver is required to write a note to the Initiator indicating why the PCR was rejected.

**NOTE:** The rejected item will not display in the Initiator's Inbox, and the Approver will still see a comments work item in his or her Inbox until the comments are saved.


The returned PCR is no longer in the Approver's Inbox, but is automatically returned to the Initiator. When the Initiator accesses the Inbox, the beginning of the PCR name displays REJECTED in all caps so that it is readily apparent that a PCR has been rejected.


Ex.	Title	Status	Creation Da...
1	REJECTED: 1501 - OM Action Re-Establish Position for Position -		10/30/2007

The Initiator has the following options:

- Cancel OM/PA Action (stop and cancel Workflow for the PCR)
- Change and Resubmit (make a change to the PCR and restart the workflow approval process from the beginning approval level)
- Cancel and keep work item in inbox (leave in the Initiator's inbox for future processing)

## Priority Levels in the Inbox





### Workflow 3

Ex...	Title	Status	Creation Da...	Creation ...	Priority
4201	OM Action Create New Position for Position - 61000222 PCR: 5000000043	📦	10/25/2007	09:59:42	5
4201	OM Action Reallocate Position Up for Position 61000475 PCR: 5000000161	📦	11/19/2007	14:55:42	5
4201	OM Action Position Transfer for Position 61000192 PCR: 5000000158	📦	11/06/2007	17:12:57	5

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### Notes

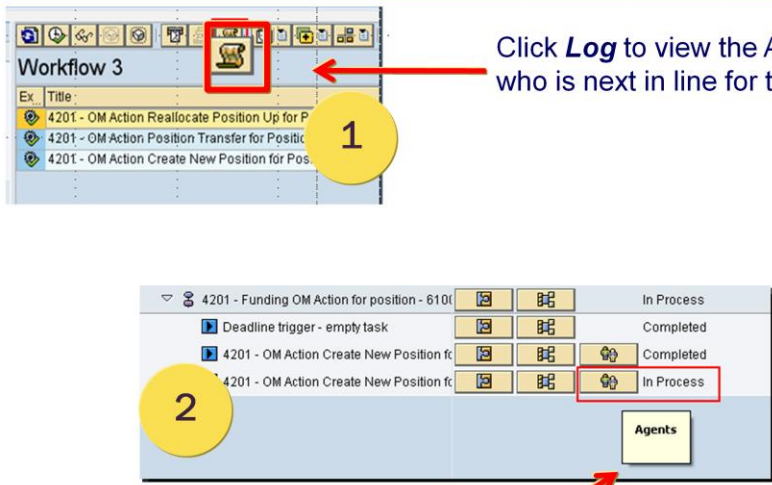
A **Priority** is a setting that indicates the urgency of the Workflow item based on the business requirement. Level 5 is the default priority for all PCRs. Only Division Approvers can change the priority setting, and only when the PCR is in the Division Approver's Inbox.

See the *Business Workplace Button Functions Job Aid* on BEACON Help for more information on setting priorities.



## Display and View the Workflow Log





Click **Log** to view the Approver who is next in line for the PCR

Click **Agents** to view the list of Approvers for that step


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### Notes

The Workflow Log is a document within Workflow that contains the Step, Status, Result, Time and Agent. The Workflow Log answers the question, "Who has the Workflow item in his/her Inbox?".

After you select the Log option, the next screen displays the various results for each step. In addition, the Agents option is displayed. Click the Agents icon to view the list of the Approvers for that step.

## Display and View the Workflow Log



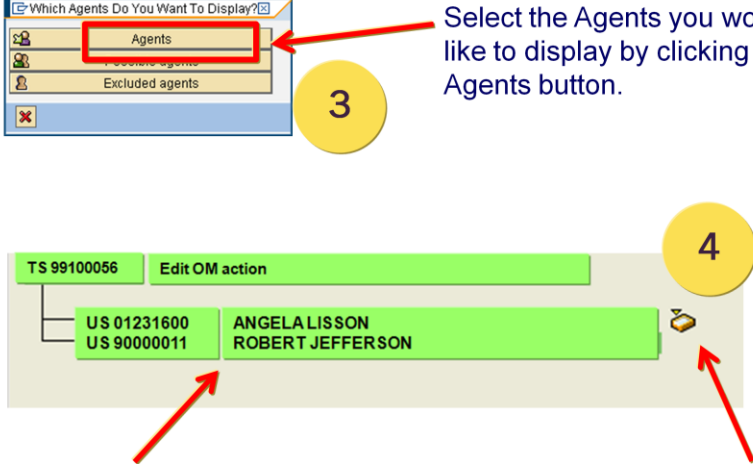
**3** Select the Agents you would like to display by clicking the Agents button.

**4**

View the names and personnel numbers of the Approvers (Agents)

See which Approver has it in Inbox

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The Workflow Log illustrated above indicates that this Work Item has two possible Approvers at this level: Angela Lisson or Robert Jefferson.

### Notes

# Workflow Tracker

DM Action Reallocate Position Up for Position 61000475 PCR: 5000000161

Objects and attachments

- OM Header PCR 5000000161 - Position 61000475
- OM Control Workflow Tracker**

1

Select the Workflow Tracker Link

Header

Detail

Workflow actions

Request ID 5900000265 Action 100 Create New Position Status R Rejected

Agency 9291 Judicial Branch Position 65000300 Magistrate

Creator 1230121 Winnie Johnson Crech Org Unit 8

Seq	Role	Mand	Type	Atype	Agent ID	Name / Description	Act	Desc	Cntrl	Actual	Name
1			P	P	01230121	Winnie Johnson Crech	P	Processed		01230121	Winnie Johnson Crech
100	FA1	X	A	P	00939625	Debbie Strickland Watkir	P	Rejected	X	90000011	Jeffrey Andrew Rappaport
300	AA1	X	A	P	00939625	Debbie Strickland Watkir					
400	SOM	X	A	P	01503910	Anita Hicks Ward					
400	SOM	X	A	P	00600933	Julia B Parsons New					
400	SOM	X	A	P	01400063	Gina M Marrano					
400	SOM	X	A	P	01014432	Twanetta Vushan Lytle					
2			P	P	01230121	Winnie Johnson Crech					

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The Workflow Tracker is a link in the bottom right of the Inbox or Outbox screen (you may have to scroll in order to see it). Using Workflow Tracker, you can see which Approver has processed the PCR, the action the Approver took, and where the PCR is being routed next.

Notes

**Workflow Tracker**

System Help

Workflow actions

Heading

Request ID 5000000265 Action 100 Create New Position Status R Rejected

Agency 0201 Judicial Branch Position 05000300 Magistrate

Creator 1230121 Winnie Johnson Creech Org Unit 0

Seq	Role	Mand	Ptype	Atype	Agent ID	Name/Description	Act	Desc	Cmnt/Actual	Name
1			P	P	01230121	Winnie Johnson Creech	P	Processed	01230121	Winnie Johnson Creech
100	FA1	X	A	P	00039625	Debbie Strickland Watkin	R	Rejected	X 90000011	Jeffrey Andrew Rappaport
300	AA1	X	A	P	00039625	Debbie Strickland Watkin				
400	SOM	X	A	P	01503910	Anita Hicks Ward				
400	SOM	X	A	P	00600933	Julia B Parsons New				
400	SOM	X	A	P	01400063	Gina H Marrano				
400	SOM	X	A	P	01014432	Twanetta Vushan Lytle				
2			P	P	01230121	Winnie Johnson Creech				

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The Header section will show at a minimum the following fields:


- Request ID (PCR Number)
- Action type (code and name)
- Status (the overall status of the work item)
- Creator (Initiator)

In Addition the header will include specific fields pertinent to either the PA or OM Action (like employee name or position number).

The Detail section will list these attributes:

- Sequence (line item sequence)
- Role represents the approver relationship
  - FA1-Funding Approver
  - DA1 Division Approver
  - AA1- Agency Approver
  - SOM-Shared Services
  - OM Processor
- An X in the Mandatory column indicates that the approval of the specific Approver is required.
- Ptype is used to signify the Processor (P) and Approvers (A)
- Agent ID represents the Personnel number of the Approver
- Name/Description lists the name of the Employee
- Act/Desc holds value (P) Processed
  - A = approved
  - R = rejected
  - P = processed
- An X in the Cmnt column will indicate if a rejection note has been created for the Action. To see the comment, highlight the line and click the Notes icon (eyeglasses).
- Actual/Name is the Initiator's Personnel number and name

## Notes



## Display and Use the Workflow Header

**1**

Click the title of the OM or PA Header Link

4201 - OM Action Reallocate Position Up for Position 61000475 PCR: 5000000161

Description: **OM Header, PCR\_5000000161 - Position 61000475**

**2**

OM Action Request

Employee Action Request

PCR Number: 5000000161  
 Personnel Number: 5000000161  
 Last 4 digits(SSN): 5000  
 Effective on: 08/25/2008  
 Org Unit: 00000000  
 Job: 00000000  
 EE Position: 00000000  
 Pay Scale Area: 01  
 Pay Scale Group: 01  
 Pay Scale Level: 01  
 Annual Salary: 42,500.00  
 Hourly Salary: 160.00  
 Next Inc Date: 08/25/2008


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### Notes

When you receive a PCR in your Inbox, you should obviously review the OM or PA Action prior to approving, returning, or cancelling it. Click the link for the Header in order to access the Action screen to see the data that was entered for the PCR.

By using the Header, you can also access the Services for Object button to see any notes or attachments that were sent with the PCR.

## Deleting PCR (Initiator)

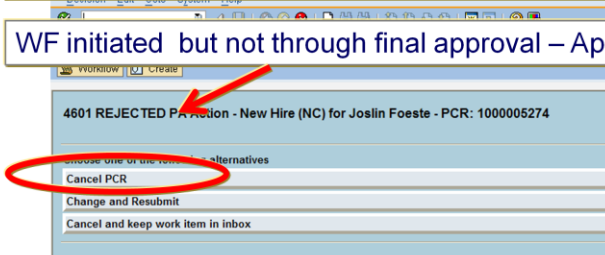


- 1

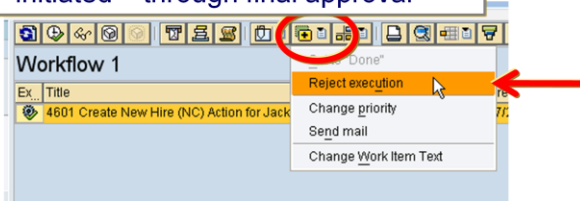
WF saved, not initiated:

  - Use the Delete Button if PA
  - Contact BEST if OM
- 2

WF initiated but not through final approval – Approver rejects


- 3

WF initiated – through final approval



Slide 34

### Notes

The method you use to delete a PCR depends upon where it is in the process.

#### 1. If the WF is saved but not initiated:

- Use the Delete button on the PCR if PA
- Contact BEST if OM

#### 2. You initiated Workflow but the PCR has not reached final approval:

Contact the Approver and request that the PCR be returned (rejected) to you. You can then Execute the PCR. When the Decision Step in Workflow screen displays, click the Cancel PCR option (illustrated above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

#### 3. You initiated Workflow and PCR has been approved by final approver but not yet executed:

You can only use this option if you have **not executed** the PCR. Highlight PCR and click the “Other Functions” button. From the drop-down menu, select “Reject Execution” (see above). The PCR disappears from your Inbox. You can still see it in your Outbox > Started WFs; however, it will indicate it was Completed/deleted.

## Lesson Review



In this lesson, you learned to:

- Access Workflow Inbox in transaction code SBWP
- Use the different Folders and options in Inbox and Outbox
- Identify the Workflow Item Statuses
- Identify the priority levels that can be set for a PCR
- Open a Workflow Item
- Review the Workflow Log
- Use the Workflow Tracker
- Use the Workflow Header

Slide 35

## Notes

**Course Map**



Lesson 1: Workflow Overview

Lesson 2: Access and Navigate the Workflow Inbox and Outbox

**Lesson 3: Approve OM Workflow PCRs**

Lesson 4: Approve PA Workflow PCRs

Lesson 5: Workflow Report

Lesson 6: Course Review

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**Notes**



## Lesson 3 Objectives

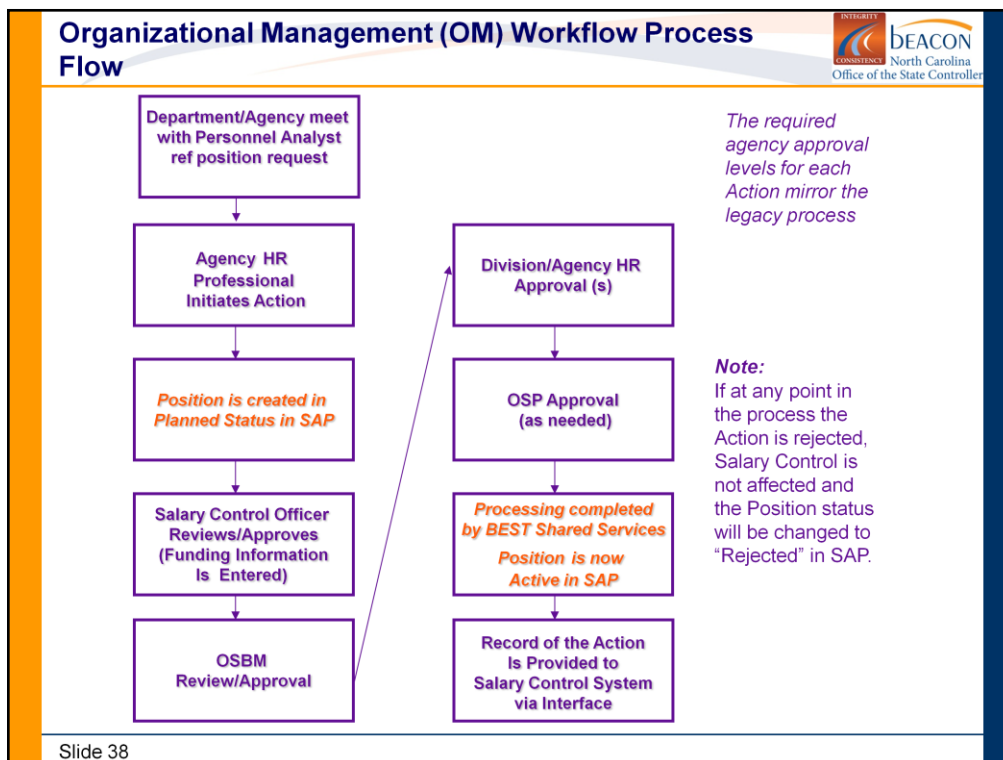


Upon completion of this lesson, you should be able to:

- Describe the OM Position Workflow process
- Discuss the routing and processing of OM Workflow Items
- Approve a new Position
- Remove a Position PCR from the process
- Use the Workflow Log and Tracker

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## Notes



All OM Position *Actions* are initiated in Workflow (WF). Approvers at any level can approve to the next level or return to the Initiator. The Initiator can make applicable changes and resubmit to begin the approval process over again.

## Notes

### Roles involved in Position Actions:

- Agency HR Personnel Analyst researches the Action with the appropriate manager.
- Agency HR personnel uses ZOMA069 to enter the required Position data in **planned** status and then initiates Workflow for approvals.
- Agency Salary Control Officer (Agency Position Funding Approver) enters cost distribution and salary and approves the WF or rejects it.
- The OSBM (Office of State Budget and Management) Position Funding Approver approves or rejects the Position Action. OSBM approval is not required for temporary positions.
- Agency Position approver approves or rejects the Position Action.
- Division Position approver approves or rejects the Position Action.
- The OSP Position approver approves or rejects Position Action.
- After final approval, BEST reviews and moves the status to **active**.

It should be noted that some Position changes can be made without Workflow such as:

- Position Working Title
- Position Type
- Cost Distribution changes and Budgeted Salary changes (Funding Approver role only)
- Time Settings
- Vacancy changes
- Position Address

OM Routing Table

Action	Action Description
100	Create New Position

Approval Process...

Agency Position Funding Approver
Office of State Budget Management (OSBM)
Agency Division Approver (optional)
Agency OM Position Approver
Office of State Personnel (OSP) (if required)
BEST Shared Services


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Notes


Only the new Position OM Action requires OSBM Approval.

BEST Shared Services is not an approval level, but rather a process step to complete position Actions.

## OM Routing Table (con't)



Action	Action Description
102	Re-Establish Position
103	Reallocate Position Up
104	Reallocate Position Down
105	Reallocate Position Horizontal
106	Position Adjustment from Authorization
107	Reallocate Position Differential
108	Remove Position Differential
109	Abolish Position
113	Position Transfer
115	Position Hours Change
116	Position Employee Group / Subgroup Change



Agency Position Funding Approver
Agency Division Approver (optional)
Agency OM Position Approver
OSP (if required)
BEST Shared Services

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### Notes

These Actions shown above do not require OSBM approval.

BEST Shared Services completes these Position Actions in a similar manner as new Position Actions.

**NOTE:** The abolish action currently requires a ticket entered with BEST Shared Services for processing.

**ZOMA069 Position Action Screens - Initiator**

BEACON North Carolina Office of the State Controller

Position Action

1

2

Position

Action 100 Create New Position

Position

Valid from 12/01/2007 to 12/31/9999

General Address Time Cost

Position 6500377 Transportation Staff Engineer I

Valid from 01/01/2006 to 12/31/9999

Intense status 2 Planned Work Flow Status 1 Created PCR Number 500000000

Position abbr. Transportation Staff Engineer I

Company Code 1501 Transportation

Business Area NC00 Pay Interface

Employee group EE subgroup A1 FTN/FLSAOT Perm

Hours per Week 40

SIC Code 832 Legal Assistant

County Code 032

Position Types: None Emergency Essential Key Non-Key Position

Position Relationships

Org Unit 2000118 DOJ Legal Services Branch

Job 3000500 PARALEGAL

Reports To 60016402 CHIEF DEPUTY ATTORNEY GEN

Pay Grade Pay Scale

Salary structure data

Cls Grouping USA Pay grade 30005000

Pay grade type 02 Standard Level C1 To C1

Area 06 Career Banding Key Date for Display 01/01/2006

Currency key USD

Pay grade 31,657.00 To 64,187.00

Reference salary 0.00

Time unit Annually

Position 6500377 Successfully Created

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Following is a brief explanation of how an Initiator creates an OM WF Action.

The Initiator uses transaction code ZOMA069 for position Actions.

**NOTE:** Training on ZOMA069 is provided in the *OM210 – OM for Agencies* course.

On the initial screen, the Initiator indicates:


- Action type (new position, reallocate, change county, etc.)
- Effective date
- Position number (only if revising an existing position). Alternatively, the Initiator can also use the Position field to search for a Position that is still in Planned status.

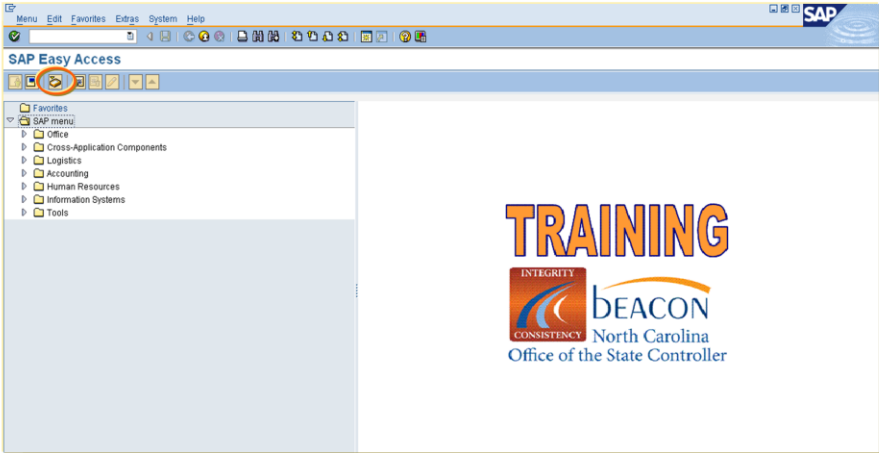
When the Initiator clicks the Create button, a second screen is displayed. The second screen has four tabs (General, Address, Time, Cost). The second screen is either blank or has data depending upon whether creating a new position or updating an existing position. The Initiator enters data as needed on the first three tabs and saves the WF item. When the WF item is saved, BEACON assigns a PCR number. At this stage in the process, the Initiator can include a note or attach documents as needed and then initiate Workflow.


The WF PCR leaves the Inbox of the Initiator and goes to the Inbox of the Approver(s) at the first approval level (Agency Funding). The Funding Approver will review the General tab and enter applicable funding data (Cost distribution and budgeted salary) on the Cost tab.

## Notes

## Accessing the Workflow Inbox (SBWP)



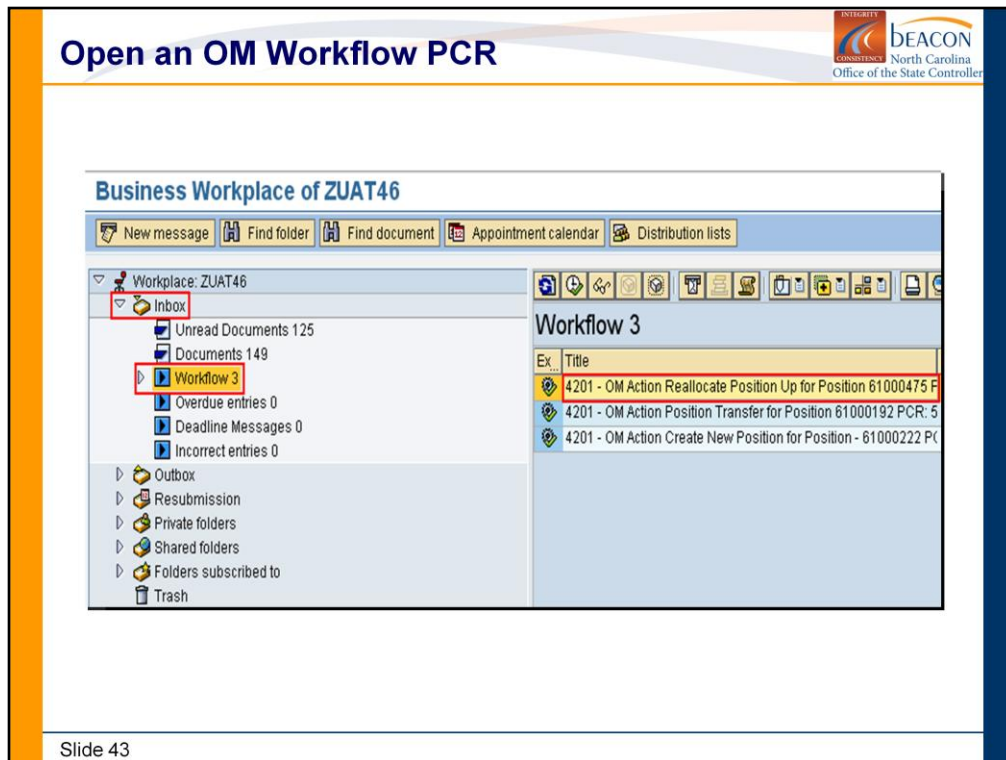


Click the **SAP Business Workplace**  button

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### Notes

As the OM Approver, you will log into your Inbox (SAP Business Workplace, or transaction code SBWP) to view all of the Workflow PCRs that have been sent to you to process.



## Notes


Follow these steps to enter the SAP Workflow Inbox:

- 1) Click the Inbox to expand it.
- 2) Double-click Workflow. All of the WF PCRs sent to the Approver for processing display in the right column. In the illustration above, the Approver has three PCRs in the Inbox.
- 3) The Approver can either select and double-click on the WF PCR to execute it or click the Execute button on the toolbar.

Refer to the BEACON Help website for assistance with icon and button recognition. The following Workflow Job Aids can be of help:

- *Business Workplace Button Functions*
- *Business Workplace Overview Tree Functions*

## Workflow Header to Review the PCR



Tips & tricks: Execute work item ...

**4601 - OM Action Reallocate Position Up for Position - 65002217 PCR: 5000002016**

**Description**  
Workflow status: **Approved**

Please review the information in this screen and make your choice as follows:

**Approve change** - the request will continue onto the next approver or processor.

**Return to initiator** - the request will be returned to the person creating the request.

**Objects and attachments**

- OM\_Header\_PCR-5000002016 - Position 65002217
- OM\_Controller\_Workflow\_Tracker

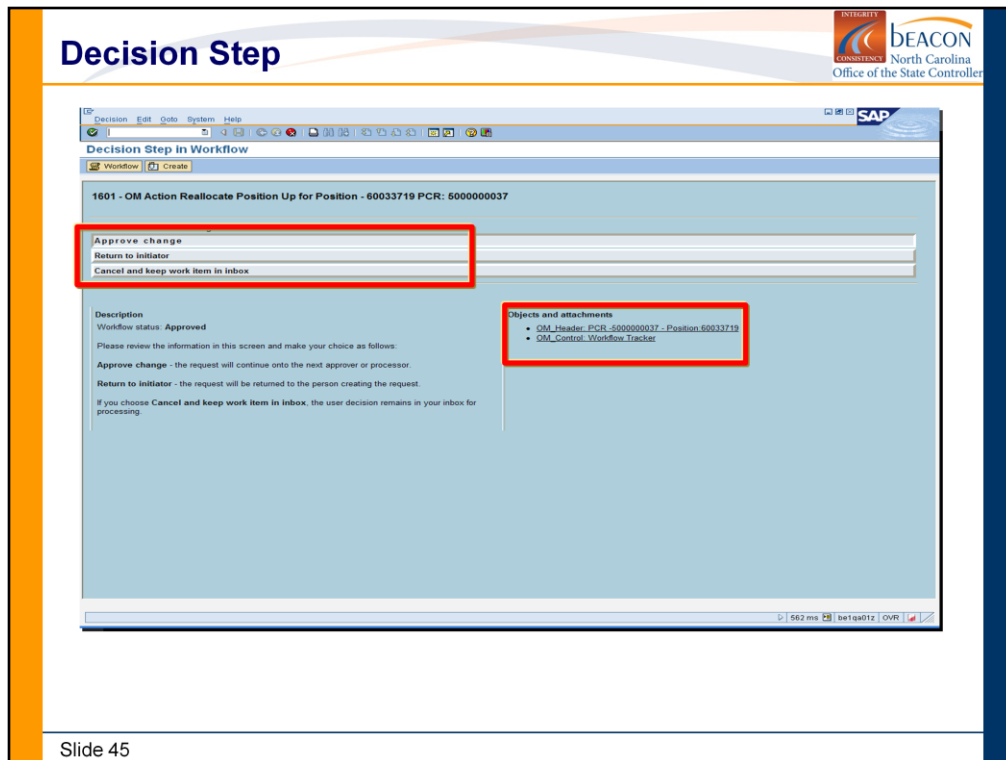
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To review the PCR, the Approver must click the OM\_Header PCR - <pcr number> Position <position number> link located in the lower left. The PCR opens and allows the Approver to view the data that the Initiator entered on the various tabs.

Alternatively, the Approver can also use the Workflow Tracker (located in the same area) to see the actions already taken, by whom it was taken, and where the PCR will be sent next.

### Notes





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## Notes

After the PCR is executed, the *Decision Step in Workflow* screen is displayed. The Approver can also view the Header and Tracker from this screen. The Approver can either Approve, Return to Initiator (reject), or Cancel and keep the work item in the Inbox.

**NOTE:** “Cancel and keep the work item in inbox” places the PCR only in the Inbox of the Approver who cancelled it. This decision removes the PCR from the Inbox of any other Approvers who were at the same Approval level. Using the Cancel function allows an Approver to research information and either approve or return the PCR at a later date.

This cancel function does not cancel the PCR.

### 3.1 – Exercise: Approve a Position PCR



- A Position PCR has been sent to your Inbox. Review the PCR and accompanying note. Change the priority from medium to very high, and then approve it. In this exercise, you are the OM Division/Agency Approver.
- After you have approved the PCR, go into your Outbox and use the Workflow tracker to see the next Approver to which the PCR has been sent.



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### Notes

### 3.2 – Exercise: Reserve a Position Change PCR



You have received a PCR to change the county of a position. When you review the PCR and the accompanying attachment you believe the wrong county has been selected. Use the Reserve function to remove it from Workflow until you complete your research. In this exercise, you are the OM Division/Agency Approver.



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#### Notes

## Lesson Review

In this lesson, you learned to:

- Describe the OM Position Workflow process
- Determine the routing and processing of OM Workflow Items
- Approve a new Position
- Remove a Position PCR from the process
- Use the Workflow Log and Tracker

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**Notes**



## Course Map

Lesson 1: Workflow Overview

Lesson 2: Access and Navigate the Workflow Inbox and Outbox

Lesson 3: Approve OM Workflow PCRs

**Lesson 4: Approve PA Workflow PCRs**

Lesson 5: Workflow Report

Lesson 6: Course Review

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**Notes**

## Lesson 4 Objectives

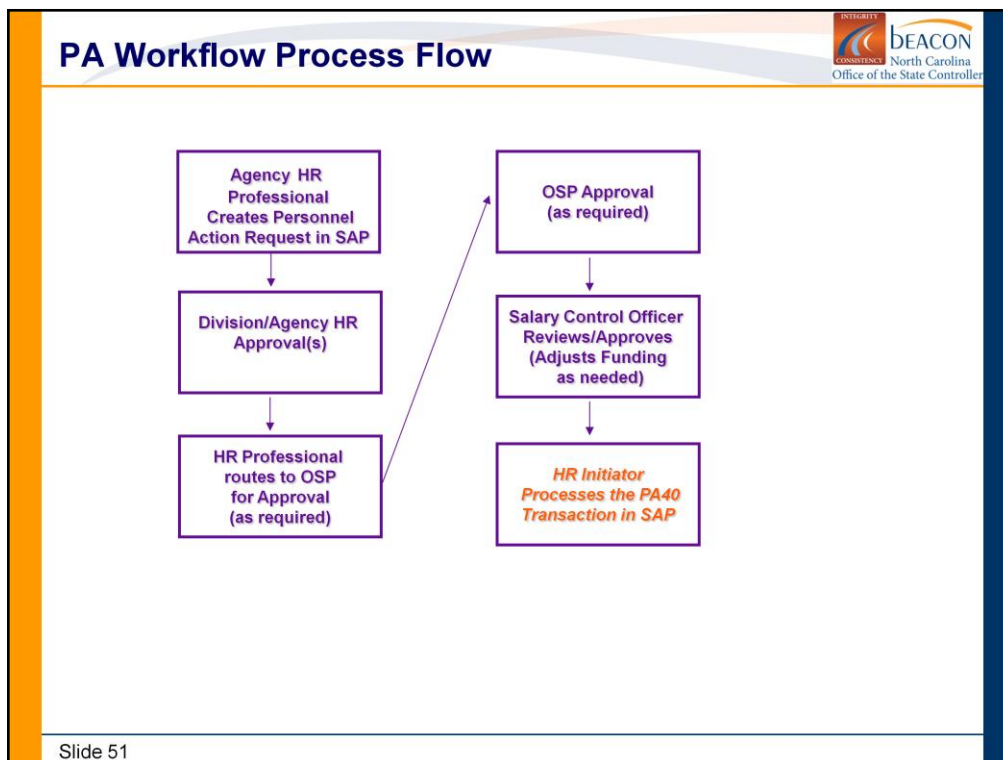


After completing this lesson, you should be able to

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

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## Notes



## Notes

The PA action is not complete until the PCR has been approved and processed by the Initiator. The WF PCR is simply a form to collect some of the basic information for approval purposes before the Personnel Action is processed (and the employee's personnel file is updated). When the approval process is complete, the Initiator receives the PCR back in his or her Inbox. The Initiator executes the PCR from the Inbox and BEACON automatically takes the initiator to the appropriate screen (Hiring for New Hires and Non-Beacon to Beacon; Personnel Actions for all others). The Initiator enters data or saves all applicable infotypes (BEACON SAP has bundled all of the appropriate infotypes that require attention for the Action). After all infotypes have been completed, the Initiator receives the "Complete Workflow Item" button. It is important that **only** when the PA Action has been completely processed should the initiator mark the PCR workflow item as complete (the exception to this is when a Transfer Agency to Agency is involved and the Initiator does not have security access for both Agencies—see *PA410 - Advanced Create and Maintain Data* for details).

If the PCR is marked complete prior to the Action being completely processed in BEACON SAP, the Initiator must use transaction code PA40 to re-process the Action and enter data and/or save as applicable every infotype appropriate for that Action.

**ZPAA076 – PA Workflow**

**Employee Action Request**

**1**

Existing PCR No.

Personnel No. 80000838 Ronald Barr04

Last 4 digits (SSN) First

Effective on 06/23/2008

Action Type Z1

Reason P1

**2**

**Employee Action Request**

Initiate WF

PCR Number

Personnel Number 80000838 Ronald Barr04

Last 4 digits (SSN)

Effective on 06/23/2008

Action: Z1 Promotion

Reason: P1 Promotion

CURRENT		PROPOSED	
Pers Area	4801 Cultural Resources	Pers Area	4801 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgroup	A1 FT N-FLSAOT Perm
Org. Unit	20010155 CR CDS ASH HIS RES ASR ST	Org. Unit	20010155 CR CDS ASH HIS RES ASR ST
Job	30001559 Records Services Branch S	Job	30001559 Records Services Branch S
EE Position	65002100 Records Services Branch Supen	EE Position	65002100 Records Services Branch Supen

☐ Work Against

**Basic Pay**

Pay Scale type	Play Scale Area	Play Scale Group	Annual Salary	Hourly Salary
01 Graded	01 Annual Salaries	0874 Level GR	43,490.00	0.00
01 Graded	01 Annual Salaries	0874 Level GR	43,474.00	0.00

Calc Step - NP

Min 43,474.00

Max 71,957.00

Next Inc Date

**Dates**

Last day worked

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## Notes

Following is a brief explanation of how an Initiator creates a PA WF Action.

Using transaction code ZPAA076 for Personnel Actions the Initiator enters data on the initial screen.

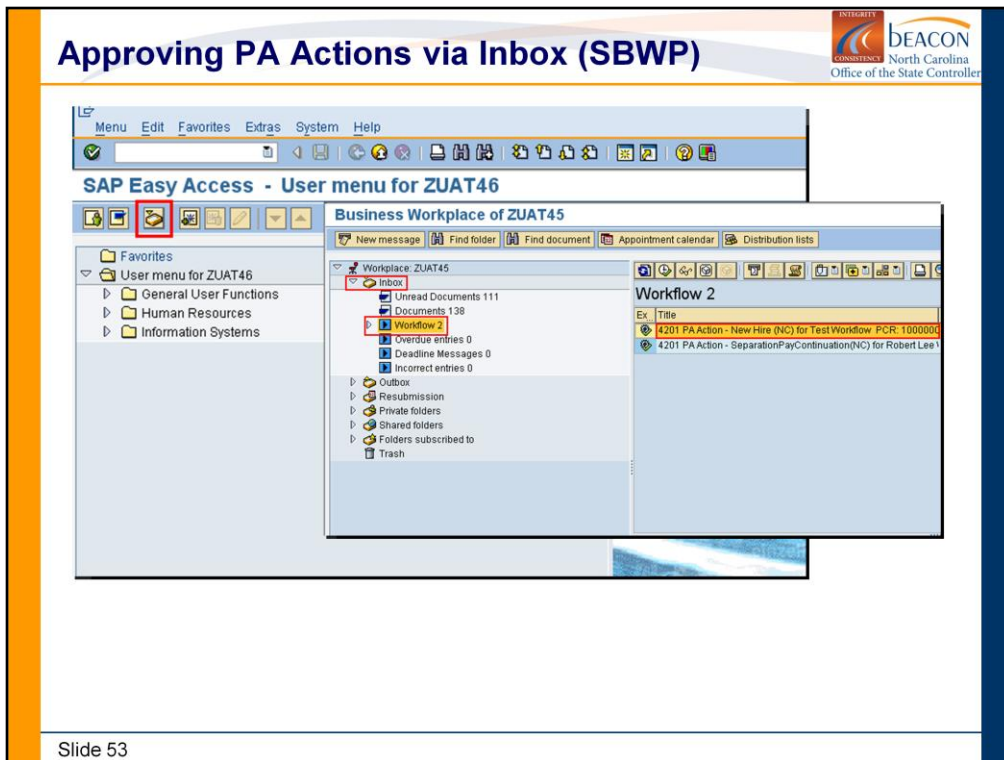
**NOTE:** Training on ZPAA076 is provided in both the *PA310 – Create and Maintain Employee Data* and *PA410 – Advanced Create and Maintain Employee Data* courses.

On the initial screen, the Initiator enters:

- PCR (only if updating an existing PCR)
- Action type
- Last 4 digits of Social Security number (only if new hire)
- Effective date
- Action type
- Reason

When the Initiator clicks the Create button, a second screen is displayed. The second screen has two columns, Current and Proposed. If the Action is a new hire, the Current column is blank; otherwise it is populated with the existing data for the employee. The Initiator enters data in the applicable fields in the Proposed column and saves the Workflow item. The Initiator receives the PCR number and initiates WF. The WF PCR leaves the Inbox of the Initiator and goes to the Inbox of the approver(s) at the first approval level.





## Notes

Approving PA Actions is, in many ways, similar to the process you used to approve Position Actions in earlier exercises. You will access your Inbox to locate PA PCRs that have been sent for you to approve, cancel, or return.

You can view notes and attachments as well as use the Workflow Tracker and Log.

#### 4.1 – Exercise: Change Priority & Approve Promotion PCR



- Review the PCR and accompanying note to promote Allison Sellers
- Change the priority from medium to very high
- Approve the PCR
- Use Outbox to view Workflow Tracker



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#### Notes

## 4.2 – Exercise: Reject a Salary Adjustment PCR



- Review the PCR and accompanying note to give Nancy Gonzalez a salary adjustment
- Reject the PCR and write a note to Initiator
- Use Outbox to view Workflow Tracker



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### Notes

### 4.3 – Exercise: Cancel a Suspension PCR



- Review the PCR and accompanying note to place Ronald Barr on suspension
- Cancel the PCR



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### Notes

#### 4.4 – Exercise: Replace a PCR

- Place the Position Change PCR Back into Workflow and approve it
- Place the Suspension PCR back into Workflow and send to OSP



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#### Notes

### Optional Funding Exercises



- Funding Approvers should attend the *WF250 - OM/PA Funding Approvers* course
- An optional exercise is presented in the Exercise Guide if needed:
  - Split funding for a position



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Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.


### Notes

## Lesson Review

In this lesson, you learned to:

- Describe the PA Personnel Workflow process
- Discuss the routing and processing of PA Workflow PCRs
- Approve PA Actions

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**Notes**

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DEACON

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# Course Map

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Access and Navigate the Workflow Inbox and Outbox

Lesson 3: Approve OM Workflow PCRs

Lesson 4: Approve PA Workflow PCRs

Lesson 5: Reports

Lesson 6: Course Review

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Notes



## Lesson Objectives



Upon completion of this lesson, you should be able to:

- Execute the Workflow Report
  - Access and execute the Workflow Report for PA and OM
  - Change the layout of the report
  - Create a variant for the report
  - Retrieve a report variant
- Execute the Organizational Structure Report

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## Notes

## Workflow Report Overview




- The Workflow Report allows Approver and Managers to see at a glance the:
  - type of Actions and reasons created in the Agency
  - Actions that are awaiting approval and at which approval level
  - length of time an approval has been waiting
- Transaction codes:
  - ZPA0189 ( PA reports)
  - ZOM0178 (OM reports)
- Reports can be run based on security by:
  - Agency
  - Groups
  - Individual PCR
- Access the **Workflow Report Job Aid** online at:
  - <http://help.mybeacon.nc.gov/beaconhelp/TOC7.html>

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## Notes

## Searching for PCRs



- PA
  - Personnel number
  - Action type
  - Personnel area
  - PCR ID
  - PCR WF Approval Level
- OM
  - Position ID
  - Action
  - Personnel area
  - PCR IDPCR WF Approval level

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**Notes**

Report Options

Sort  
Ascending

Filter

Print  
Preview

Word

Mail  
recipient

Graphic

Select  
layout

Sort  
Descending

Total

Excel

Local file

ABC  
analysis

Change  
layout

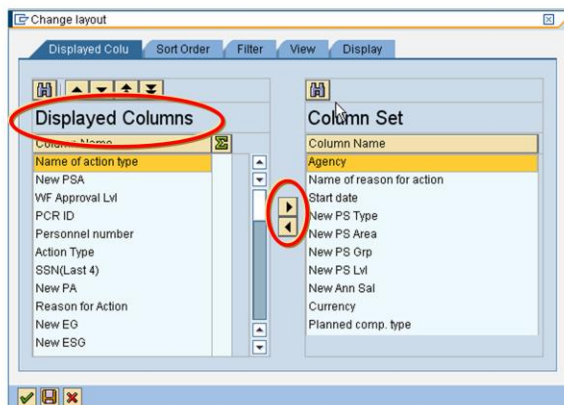
Save  
layout

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Notes

## Modify Layout

Use the Change Layout option to remove fields that you do not want to display from left to right



Drag and drop columns on the report to change the order


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## Notes

## Save Layout


- Save layout field
  - Short name (begin with Z for user-specific)
- Name
  - Longer description for the layout
- User-specific
  - Only you have access
- Default setting
  - Indicates you want the layout to display each time the report is run

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### Notes

## Use a Layout



- Complete search criteria fields for the report
- Click the Select layout option
  - or
- From the menu: Settings > Layout > Choose
- Select the applicable layout option
- Execute the report

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**Notes**

## 5.1 – Exercise: Execute the Workflow Report (PA)



You need to see if there are any Suspension and Reallocation PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval. In addition, you want to change and save the layout to your specifications.



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### Notes



## 5.2 – Exercise: Use a Saved Layout to Run WF




You need to see if there are any Promotion PA Actions for Org Unit 4601 (Cultural Resources) awaiting approval. You want to use the same layout that you previously saved.

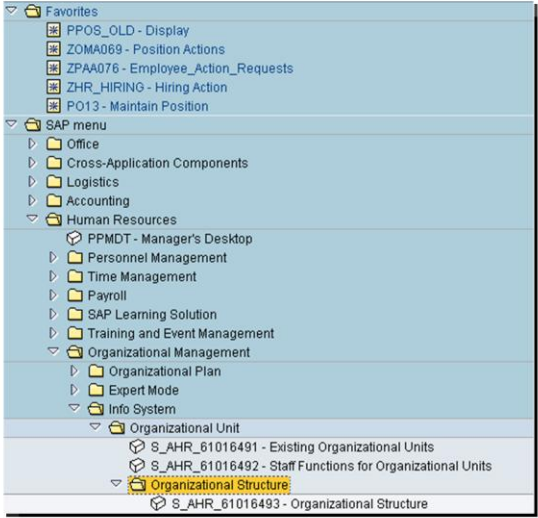


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### Notes

## Display the Organizational Structure Report





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### Notes

Use transaction code **S\_AHR\_61016528** - Organizational Structure to generate an Organizational Plan view of the approvers supporting the workflow process.

OM approvers are identified by having a relationship created between their position and the Organizational unit. The Organizational unit represents a segment of the structure that approvers are responsible for managing within the workflow process.

Positions will not necessarily be approvers within their own organizational unit. Approvers may be responsible for a larger grouping of organizational units. As a result, a relationship between their position and the highest organizational unit within that area will be created and inherit responsibility for all organizational units within the hierarchy.

#### **Users of this report could be:**

- Position Action and Employee Action Initiators
- Approvers (Agency Approvers, Division Approvers, OSP, OSBM)
- BEST Shared Services
- BEACON Production Support Team

**Display the Organizational Structure Report**

Program Edit Goto System Help

**Structure Display/Maintenance**

**Objects**

Plan version: 01 Current plan  
Object type: 0 Organizational unit  
Object ID:   
Search Term:   
Object status: 1 All existing

**Reporting period**

☒ Today ☐ All  
☐ Current month ☐ Past  
☐ Current Year ☐ Future

**Structure parameters**

Evaluation Path: **Z\_WF\_AA1** Organizational str  
Status vector: 1 ☐ Status ov  
Display depth:   
☐ Recursion  
☐ Classic Output

**Evaluation Path (1) 15 Entries found**

Restrictions

EvalPath	Evaluation path text
Z_B002	MSS: Is line supervisor of
Z_WF_AA1	All Agency Approvers for a given Org Unit
Z_WF_BA1	All OSBM Approvers for a given Org Unit
Z_WF_DA1	All Division Approvers for a given Org Unit
Z_WF_FA1	All Funding Approvers for a given Org Unit
Z_WF_OA1	All OSP Approvers for a given Org Unit
Z_WF_SOM	All BSS OM Activators for a given Org Unit
Z_WF_SPA	All BSS PA Activators for a given Org Unit
Z1_CHARG	All charges under an organizational unit in the org. structure
Z30_C	Job Branches with Jobs
ZJF_30	Job Families with Job Branches
ZJF_30_C	Job Families with Job Branches and Jobs
ZLINESUP	MSS Root: Line Supervisor (002)
ZOCLUS	Custom Eval path for OrgPlus
ZPID_CVR	Cats Profile Assignment

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## Notes

At the Structure Display/Maintenance screen, enter specific selection criteria.

To display the Evaluation Path, use the matchcode and enter Z\* to search for the available paths:

- Z\_WF\_AA1 Agency Approvers for an Organizational unit structure
- Z\_WF\_BA1 OSBM Approvers for an Organizational unit structure
- Z\_WF\_DA1 Division Approvers for an Organizational unit structure
- Z\_WF\_FA1 Funding Approvers for an Organizational unit structure
- Z\_WF\_OA1 OSP Approvers for a Organizational unit structure
- Z\_WF\_SOM BEST Shared Services processes for an Organizational unit structure responsible for OM Position Actions
- Z\_WF\_SPA BEST Shared Services processes for an Organizational unit structure responsible for PA Employee Actions

Display the Organizational Structure Report

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Structure Display

Edit

Goto

System

Help

Structure Display/Maintenance

Plan Version: 01

Evaluation Path: Z\_WF\_AA1 (All Agency Approvers for a given Org Unit)

Depth: 0

Status Vector: 1

Evaluation Period: 01/01/1900 - 12/31/9999

Object Description

Object abbr.

Object Type

Extended object ID

Status (Object)

Start Date (Object)

End Date (Object)

☐

State of North Carolin 0000-StateNC

☐

Governors Office 3000-Gov Off

☐

OSC/Beacon 501000000000

☐

OSC/Beacon/Project 5010010000000

☐

OSC/Beacon/Change 501002000000

☐

OSC/Beacon/Technic 501005000000☐☐☒☒☒☒☒☒

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O

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10000000

10000001

10000002

10000003

10000004

10000005

10000006

10000009

10000017

54214951

10000019

53409007

59033452

59900998

1

1

1

1

1

1

1

1

1

1

1

1

1

1

1

01/01/1900

01/01/1900

04/10/2007

04/10/2007

04/10/2007

04/10/2007

01/01/1900

01/01/1900

01/01/1900

01/01/1900

01/01/1900

01/01/1900

01/01/1900

01/01/1900

01/01/1900

12/31/9999

12/31/9999

12/31/9999

12/31/9999

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12/31/9999

12/31/9999

12/31/9999

12/31/9999

12/31/9999

12/31/9999

12/31/9999

12/31/9999

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SAP will display the list of all of the selected Organizational units and their Approver Positions.

Notes

### 5.3 – Exercise: Execute the Org Structure Report



You need to see a list of the approvers for OM Action for the following Org Units:

- 20010134 – CR CDS Archives and History
- 20012267 – OSBM Admin Deputy




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### Notes

## Lesson Review

In this lesson, you learned to:


- Execute the Workflow Report
  - Access and execute the Workflow Report for PA and OM
  - Change the layout of the report
  - Create a variant for the report
  - Retrieve a report variant
- Execute the Organizational Structure Report



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**Notes**



## Course Map

Lesson 1: Explain the Purpose of Workflow

Lesson 2: Access and Navigate the Workflow Inbox and Outbox

Lesson 3: Approve OM Workflow PCRs

Lesson 4: Approve PA Workflow PCRs

Lesson 5: Workflow Report

Lesson 6: Course Review

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**Notes**

## Course Objectives



In this course you learned to:

- Explain the Workflow process for Personnel Administration (PA) and Organizational Management (OM)
- Identify key differences in the routing of Workflow Items in OM and PA
- Access, navigate and complete items with the Workflow Inbox
- Use key features to manage OM/PA Workflow Items
- Execute reports

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## Notes



Questions

INTEGRITY  
CONSISTENCY

DEACON  
North Carolina  
Office of the State Controller

PARKING LOT

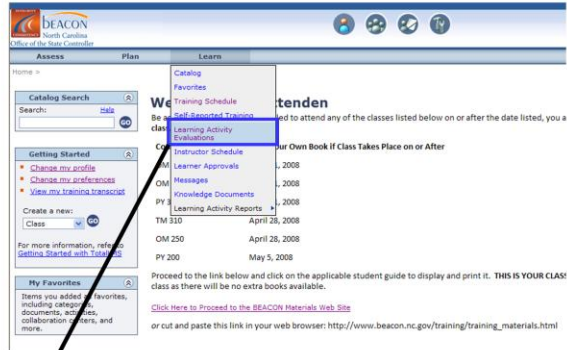
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Notes

## Level 1 – Course Evaluation

Level 1 evaluations are used by the BEACON Training Team to ensure students are experiencing their instruction in an environment and method that is conducive to learning.



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### Level 1 Evaluations

The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

### Notes

## Next Steps



- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
    - URL: <http://www.ncosc.net/BEST/>
  - BEACON Training website: **What's New** link
    - URL: [http://www.beacon.nc.gov/training/whats\\_new.html](http://www.beacon.nc.gov/training/whats_new.html)
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
    - URL: <http://help.mybeacon.nc.gov/beaconhelp>
- Practice what you've learned
  - URL: <https://mybeacon.nc.gov>
  - Client 899
  - Use your current NCID user name and password



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## Notes

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.


Keep your training materials close by as a ready reference.

### Want to practice what you have learned from your desk?

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

### Need transactional assistance after go live?

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.



# CONGRATULATIONS



You have completed the course

Please complete your course evaluation!

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**Notes**